

VIDEO AGE

international

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Int'l Fiction Fest Brings Italy's Drama to Rome

BY LEAH HOCHBAUM ROSNER

For its third annual edition, organizers behind the budding Roma Fiction Fest — set to take place July 6-11 at the Conciliazione Auditorium and Adriano Multiplex Cinema — looked high and low for ways to spice up one of the newest festivals on the block, hoping to set the Italian television drama event apart from the numerous similar affairs that have begun to fill up industry market calendars in recent years.

They hope to have found that new flavor with the first-ever Fiction Fest edition of Rome TV Screenings, which will offer the industry an overview of Italy's best television productions.

"We decided to add the Screenings because Italian fiction needs to be a significant part of the international market and it should be seen by the largest number of people possible," said Carlo Macchitella, director of the new Screenings section, which will be held July 6-7 in specially

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Lazio governor Piero Marrazzo,
 RFF's Carlo Macchitella

DISCOP: Now A Market For Newly Emerged Territories

When the first DISCOP East was held in 1991, the market was crucial to emerging Central and Eastern European territories trying to get themselves on the international television map, luring in creative types and program sales executives to show those in the long-ignored area how things were done. Now, 17 editions later, DISCOP East is an irrefutable success and the Central and Eastern European TV market is thriving, begging the question: can the region still be called "emerging"? This year, the Budapest, Hungary-based event has officially evolved into a market for a newly emerged (or developed) territory. *VideoAge* spoke with a number of DISCOP insiders and participants to find out what to expect of the market, which will take place June 17-19 at the Sofitel Hotel on the Pest side of the city.

"We cover 33 countries from Central and Eastern Europe and Central Asia and not all the countries have reached the same level of maturity," said Patrick

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TV Takes A Walk Out Of The House

BY MICHAEL MASCIONI

With the rise of new technologies, the "TV Everywhere" model has gained prominence, but one element of that concept has often been overlooked: TV in the out-of-home market, i.e.,

venues such as health clubs, gas stations, restaurants, college campuses, train stations, airlines, shopping malls, grocery stores, and taxis.

According to Suzanne Alecia, president of the New York-based Out-of-Home Video Advertising Bureau (OVAB), digital out-of-home video is a \$1.3 billion market reaching over 790,000 screens, and generating over three billion impressions (or

views) a month across all venues. To underscore the impact of this market, she noted that digital out-of-home video is the "second fastest growing media market behind (online) search." OVAB expects the

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American Series To Cure Greek Advertising Blues

BY KAREN RUTTNER

Television networks in Greece are not immune to the changing economic landscape. Across the board, income decreased by 8.4 percent in 2008 — to about 10 million euro — due to a significant reduction in advertising revenue and increased competition from other forms of media.

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Spain Cuts RTVE's Ads

Spanish Prime Minister Jose Luis Rodriguez Zapatero has agreed to dramatically reduce advertising on two of pubcaster Radio Television Espanola's (RTVE) channels, TVE1 and TVE2, over the next year. His promise comes after cries of protest from UTECA, the lobby

representing private broadcasters, which insisted that Zapatero's policy to cut RTVE's advertising allotment from 11 minutes to 10 minutes per hour last year was not a sufficient measure.

Zapatero has not specified just how much advertising he plans to do away with, but UTECA's Secretary General Jorge Del Corral said that their aim is to eliminate all ads during primetime on the public channels this year and in all day-parts in the next 12 to 13 months. The

action will be part of the upcoming Spanish Audiovisual Law, which is pending approval by Spanish parliament.

Currently, RTVE uses a mixed financing model that uses a combination of ads and state subsidies, with advertising accounting for 40.6 percent of total revenue. This year it is expected that advertising will account for 447 million euro. The Spanish government plans to compensate for the revenue that will be lost by taxing three percent of commercial (private) TV station and network revenue, which is expected to bring in 140 million euro per year. It will also levy a 0.9 percent tax on fixed and cellular telecoms, providing a projected 240 million euro per year. A portion of the tax on electromagnetic frequencies (TV, radio, cellular, etc.) will furnish another 240 million euro to RTVE. In addition, the state will contribute 550 million euro

in order for RTVE meets its yearly balance of 1.2 billion euro.

The Century Plaza To Be Torn Down

In December 2008, a group led by investor Michael Rosenfeld announced a two billion dollar plan to replace the Century Plaza Hotel in Los Angeles with two skyscrapers filled with condos and stores. The decision came only a few short months after a \$36 million revamp had been completed on the hotel, which is nicknamed the "West Coast White House" due to its popularity among Washington politicians. The CP, as it is familiarly called, is also popular among Latin American participants at the L.A. Screenings.

Rosenfeld expressed hope that the new structures would attract full-time residents to the area. But preservationists don't buy the argument, saying they'd rather keep the Century Plaza as it is now.

The Century Plaza has hosted all manner of events of historical significance, including Ronald Reagan's presidential victory party and a welcome home gala for the Apollo 11 astronauts. The National Trust for Historic Preservation views this history as a reason to save the hotel from a wrecking ball that seems to be getting closer each day, and has placed the Century Plaza on its annual list of historic endangered locales.

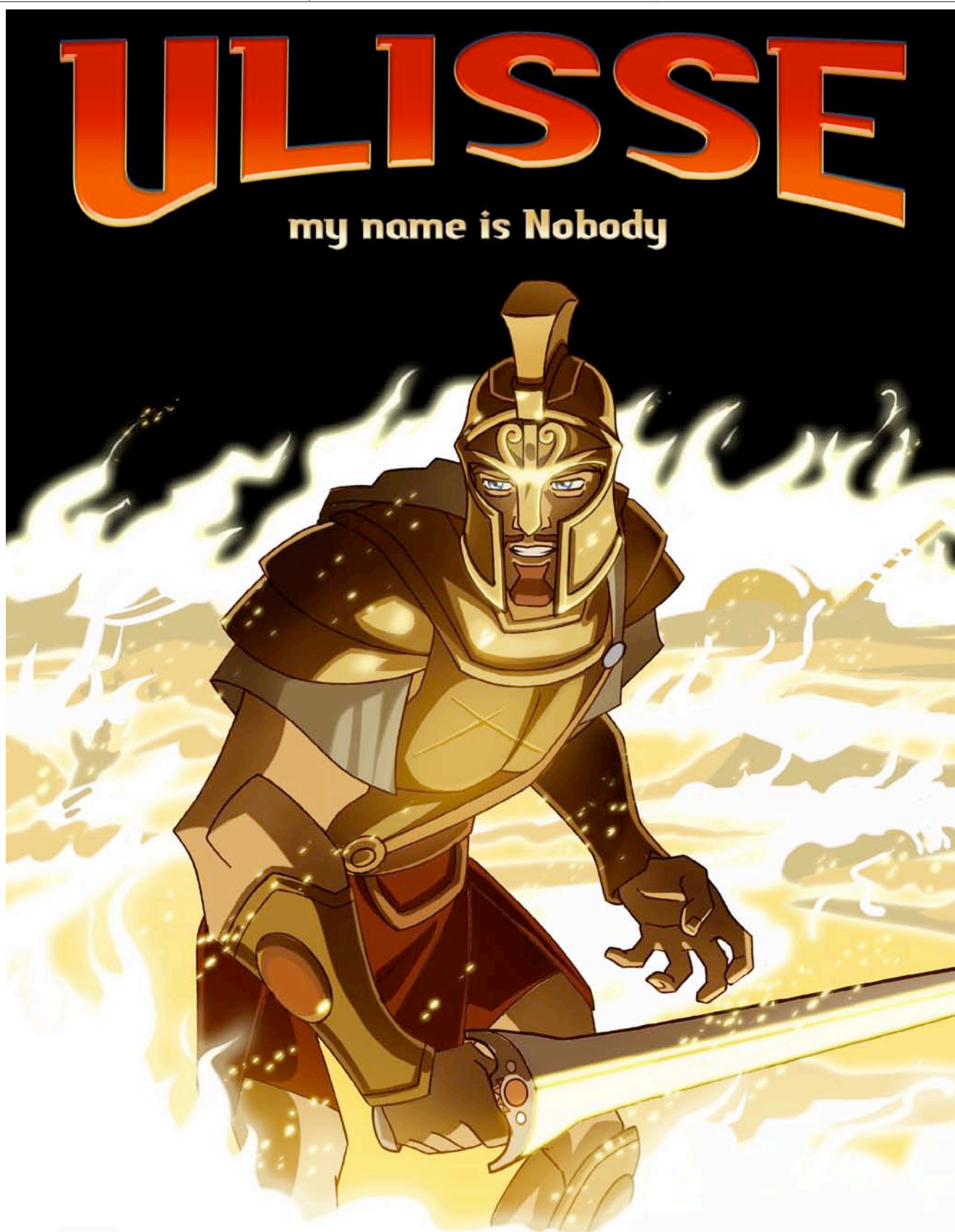
Built in Century City, a high-rise district of Los Angeles on the former site of the 20th Century Fox movie lot, the hotel, which opened its doors in 1966, was designed by architect Minoru Yamasaki, who went on to design the World Trade Center towers.

France Now Hangs Pirates

Last month, *VideoAge* reported that the French Parliament had rejected a bill to suspend Internet connections for pirate usage. Now, just over a month after that initial decision, the same National Assembly has voted in favor of a new version of the bill. Under the more recent initiative, a "three strikes" approach would be taken towards repeat copyright violators who ignored warnings to cease their pirating activities.

The bill has set off a political maelstrom pitting president Nicolas Sarkozy's U.M.P. party against the opposition group, the Socialists, and a number of interest groups which complain that the bill is overly intrusive and would be difficult to enforce. It's thought that the reason the bill didn't make it through last month was due to the

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absence of members of U.M.P., and that Sarkozy exerted some power to make sure that his party was represented in the new vote. The measure also incited a small scandal involving the termination of the chief of TF1's Web operations, Jérôme Bourreau-Guggenheim, who was discovered to have privately criticized the bill in an e-mail to his representative in the National Assembly.

The so-called "three strikes" bill is one of the more aggressive legislation initiatives against digital piracy. Similar

legislation has been stalled in the U.S. and rejected in the U.K.

CBS Buoyant For The Future

Despite posting net losses of \$55.3 million for the first quarter of 2009, CBS Corp. honcho Les Moonves is optimistic that the TV company is on the brink of an economic recovery, taking cues from the perceived rebound of local advertising.

In a statement, Moonves echoed News Corp chairman and CEO Rupert Murdoch's recent comments implying that the worst is behind us, saying: "We are confident that the second half of the year will bring improved results due to a

strong slate of syndication releases, the effect of cost reductions that were made last year and early signs of an improving local advertising marketplace."

The rose-hued remarks come on the heels of the network's recent campaign announcing its new status as the top-rated network in the nation.

In related news, banks have agreed to extend a grace period of almost two years for Viacom and CBS majority shareholder Sumner Redstone to pay back CBS's \$1.6 billion debt. Under the terms of the new deal, Redstone's stake in the two media empires will be on the table should he be unable to repay his debt by the new December 31, 2010 deadline. Insiders are speculating that Redstone will come up with a significant portion of the money he owes by selling off a number of the U.S. and U.K. cinemas owned by his holding company, National Amusements.

Disney Tries a New Mouse Trap

Six months in advance of the theatrical release of its 3D remake of the classic Dickens story *A Christmas Carol*, Disney is rolling out an unusual U.S. grassroots marketing campaign consisting of a train tour of 40 cities to promote the film. "This is actually the first movie I've been involved with that did a grassroots campaign like this," the film's director, Robert Zemeckis, told *USA Today*. "The way the face of the industry is changing, mass marketing isn't going to be enough."

Indeed, U.S. studios are pouring more and more resources into creating large-scale, non-traditional promotional initiatives to woo increasingly hard-to-reach consumers. Paramount threw a series of underground parties featuring green-painted go-go dancers in cities across the globe to tout *Star Trek*, while Fox had towns across the U.S. competing for the chance to host the *X-Men Origins: Wolverine* premiere.

Air Travelers Get Shorted

Following a year in which skyrocketing fuel prices were often passed off to air travelers in the form of fuel surcharges and new add-on fees for previously free services such as checked bags, executives traveling to L.A. for the Screenings were surprised to learn that even though fuel prices are finally dropping, TV execs aren't paying any less. What gives?

According to experts, fewer passengers are flying due to the recession, resulting in fewer routes — two realities that have resulted in little reduction in fare prices despite cheaper oil prices.

And what about those other extra charges? Like two tickets for each obese passenger? Sources agree that while baggage fees have angered many passengers, they may be here to stay. And that despite the diminishing fuel prices, airlines may simply continue to charge the same fees without clueing passengers in as to what they're for. In plain English, that means that fares are likely to stay the same, which is bad news for business travelers.

Famous Quotes

JPMorgan Chase, which received \$25 billion in bailout money from the U.S. government, is buying two luxury Gulfstream G-650 jets for about \$60 million each and planned an \$18 million "lavish renovation" of its corporate jet hangar.

— ABC News

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— Anonymous


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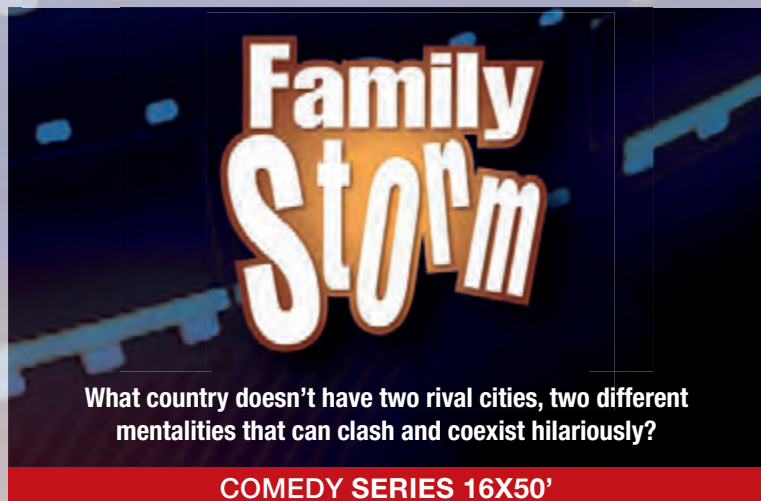
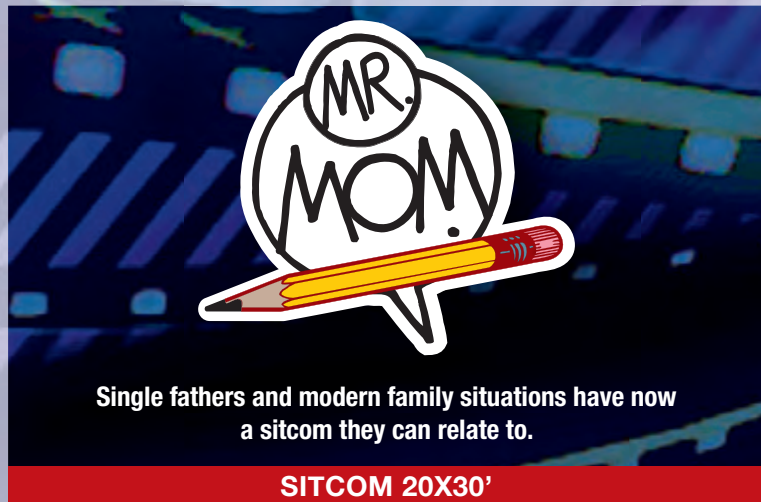

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When Nuclear Blasts Are Aimed At Disrupting Communications

One *Second After* (2009, Forge, 350 pages, U.S.\$24.95), a new hardcover by William Forstchen, may seem, at first, an unlikely choice for review in *VideoAge*. Written as fiction (but based on fact), it is the story of what might happen in the year following an EMP (Electro Magnetic Pulse) attack on America caused by a nuclear explosion not necessarily meant to kill people, but more specifically to disrupt communications. Years of research drawing from Congressional and Pentagon studies went into the development of the book, which includes a foreword written by U.S. conservative politician Newt Gingrich. Forstchen has a Ph.D. from Purdue University with a specialization in military history and the history of technology. Why, then, is it appropriate for inclusion in our pages?

As Gingrich writes in the foreword, “Few in our government and in the public sector have openly confronted the threat offered by the use of but one nuclear weapon, in the hands of a determined enemy, who calibrates it to trigger a massive EMP burst. Such an event would destroy our complex, delicate high tech digital society in an instant and throw all our lives back to an existence equal to that of the Middle Ages.” Gingrich sees *One Second After* as “a terrifying ‘future history’ that might come true” and compares it to “perhaps the most famous of the ‘future history’ books of modern times, George Orwell’s *1984*... Orwell, by his book, raised an awareness that just might have saved us from Big Brother and the Thought Police. I think that Bill’s novel may do the same.”

In other words, *One Second After* is meant as a siren call for the world to snap out of its comfort zone and consider an alternate reality that would result from a nuclear blast eliminating all modern technology — technology that obviously includes television, especially since it’s becoming all digital.

An EMP burst is the result of a nuclear bomb being detonated above the atmosphere. The explosion sends out an intense electro-magnetic wave that fries the delicate digital circuitry we so blindly depend on. Quite a bit of emphasis is placed on the pitfalls of technological advances that, under

normal circumstances, we see as positive. As computers and digital conduits become smaller and more intricate, they become more vulnerable to the impact of an EMP. The only devices to remain unharmed in the story’s attack are those with infrastructure dating back to the 1940s and earlier — AM radios, other analog devices and early model telephones. Their reliance on more basic technology — like vacuum tubes — rendered them immune. It is a twist of fate that plays out later in the book’s plot when the characters take solace in a library stash of *Scientific American* and *Popular Mechanics* back issues. “In those golden pages are plans from 80 years ago, 100 years ago, to build radios, telegraphs, steam engines, batteries, internal combustion engines, formulas for nearly every advance in chemistry,” they realize with relief. Rather than continuing the trend of hyperspeed modernization, it seems as if it’s in society’s best interest to return to basics and focus on the development of more sturdy technology.



In essence, Forstchen is playing with the duality of digital technology’s importance and the simultaneous danger of our dependence on it.

People’s reliance on television for information and peace of mind throughout history is raised at multiple points throughout the book. Shortly after the EMP strike, chaos begins to brew in Black Mountain, North Carolina — the setting of the novel. One elder resident ruminates, “Look, I’m old enough to remember 1941. Kennedy in 1963, when Reagan was shot, 2001 of course. Always we at least had radios, television. Someone to tell us what was going on, what to do, offering leadership, and that rallied us together.” And later, the protagonist John Matherson adds, “We were spoiled unlike any generation in history, and we forgot completely just how dependent we were on the juice flowing through the wires, the buttons doing something when we pushed them. If only we had some communication. If only we knew the government still

worked, a voice that we trusted being heard, that would make all the difference.” Forstchen seems to imply that societal reaction to disaster is directly affected by the presence (or in this story’s case, absence) of digital technology. Being able to switch on a television and thus feel connected to the outside world helps prevent chaos within cities.

As the action unfolds, human breakdown and madness are escalated by the fact that no one seems to know when the blanket blackout is going to end. There are no reassuring voices on the radio, no stoic politicians on the TV screens, and these absences result in maddening guesswork. This becomes increasingly frustrating as food, water, and medical supplies dwindle and refugees from nearby cities begin flooding into Black Mountain. The city’s residents are hesitant to take outsiders in because they are unsure as to whether the city’s supplies are sufficient. A ration system is already being strictly maintained because city officials don’t know whether the blackout will last days, months, or even years.

As time progresses, disintegration continues. Disease and starvation lead to rioting that in turn leads to more death and general devastation. “Amazing isn’t it,” notes Makala, a nurse and key character. “Three weeks ago we were all Americans. Hell, if somebody said an offensive word, made a racial or sexist slur, my God, everyone would be up in arms and it’d be front-page news. Turn off the electricity and bang, we’re at each other’s throats in a matter of days.”

Makala’s words encapsulate the grim suggestion of *One Second After*’s central theme, which is that without electricity — with all traditional modern communications silenced — society would crumble. It’s an interesting reality to consider as you sit pondering media like television’s impact on your own life. The novel’s protagonist constantly catches himself comparing the apocalyptic experiences of post-EMP America to scenes from his favorite movies and marvels at “how much movies had so defined so much of the country’s image of self.” Now, with the screens blank, what sort of picture remained? Does reality define media or does media define reality?

Drawing from Forstchen’s prose, we see media take on two roles in its interplay with society — mirror and leader. People tend to view fiction as reflection of a life they themselves have not led, and turn to the likes of broadcast news for guidance in times of troubled reality. Consider that when analyzing popular trends in television viewing. And also consider reading *One Second After*, as it impressively serves as both mirror and leader in regards to a potentially devastating global threat. **KR** ●

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Hard Times Drive Latin TV Mart

A new convention venue, the Transamerica Expo Center, and a new official hotel, the Blue Tree Towers, welcomed 600 participants from 22 countries for the 10th annual Forum Brasil International TV Market in São Paulo, Brazil, June 3-5. Attendance was down by roughly 50 percent in comparison to last year, a similar story to that of other markets that fell victim to the worldwide economic downturn.

Another new element of this year's

event was the meeting of television stations from Mercosur countries (Argentina, Brazil, Paraguay and Uruguay) and associated states (Bolivia, Chile and Perú). The annual "30 Minutes With" program included 22 meetings with 28 TV executives from nine different countries. Three major panels served as highlights, along with four pitching events, two workshops and the presentation of a new Canadian project. A full day of meetings with TV



Forum Brasil's Roberto Filippelli, TVTL's Antonio Dias, Alberto Alves

stations from the nine Portuguese-speaking countries of the world (spanning Europe, South America, Africa and Asia) closed the event.

Representatives from TVTL Televisao, Timor East, were so enthusiastic about the results of last year's Portuguese-language meeting that they came back full of expectations. According to TVTL's Antonio Dias, his station was able to sign a good programming deal with TV Globo last year for both telenovelas and children's shows. In anticipation of similar accords this time around, Dias and his colleagues made quite the effort to return. In order to reach São Paulo, they flew to Darwin, Australia, caught a second flight to Sydney, a third from there to Buenos Aires, Argentina and, finally, one to Brazil.

This year's Forum was situated in a more remote section of São Paulo than usual. The Expo Center is located in what could be considered the city's suburbs — an area known as Brooklin, which houses Rede Globo's headquarters.

Despite having fewer exhibitors and participants than in years past, there were still a number of useful panels, including ones about "Production Business Models" and "Business Models in a Changing World." The latter was moderated by VideoAge's Dom Serafini and featured panelists Farrell Meisel, an American TV broadcast and satellite consultant, and Charles Zamaria, professor of Radio and Television at Ryerson University in Toronto, Canada.

During his presentation, Professor Zamaria remarked, "Internet ain't TV. Internet is a destination." Meisel pointed out that with the popularity of the Internet, "[People] have more options. It's a jungle out there." Serafini challenged the panelists with questions about technology and programming, prompting debates about the switch from broadcast to broadband and whether, with IPTV availability looming, DTT (or DTT) is a useless and costly temporary technology. On the programming side, Serafini asked, "How are DTT stations going to pay to program three extra multiplexes?" and "Is it possible to eliminate risks and bring rewards to both TV outlets and producers?"

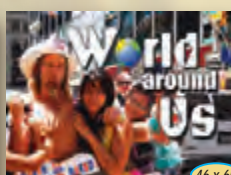
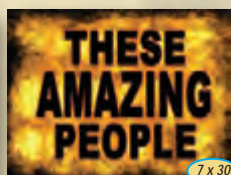


Farrel Meisel, Dom Serafini, Charles Zamaria

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Getting Ahead of the Game Delays Indies' Business

BY DOM SERAFINI

Perhaps in response to FOX's late-May Upfronts this year, NBC introduced the "Infronts," an early-May prime-time commercial bidding process in New York City. In fact, NBC started selling commercial time as early as last January, an initiative it called the "Superfronts." And while the other U.S. nets followed FOX's lead with their own Upfronts, television-advertising clients like Unilever were devising "reverse Upfronts," where brand managers were charged with researching new TV promotion ideas. In other words, the U.S. TV industry couldn't have found a more convoluted way to sell the networks' commercial inventory this year.

The late-May Upfronts meant that in Los Angeles, U.S. studios had to screen pilots selected by the nets through the Memorial Day holiday weekend (May 23-25), a period normally devoted exclusively to barbecues and the readying of summer homes.

The reduced number of buyers (1,100 versus 1,400 last year) was mainly a result of the current recession. However, some last-minute dropouts had entirely different reasons for canceling. A few Japanese companies, for example, withheld their attendance due to the recent flu scare. Nevertheless, according to studios' executives, 1,100 buyers is quite "the norm." In the past, acquisition executives that were flush with cash would come to the L.A. Screenings from all over the world just to be in Hollywood, bask in the studios' hospitality, rub elbows with the stars and have fun at the parties. With international networks cutting budgets, such extravagance has been eliminated and only the minimum number of



Producer Ned Nalle, Legend of the Seeker's Craig Horner, Disney's Ben Pyne, Legend's Bridget Regan

programming personnel were shipped to the L.A. Screenings.

Regarding pilots, this time around, the studios didn't have to contend with a disastrous screenwriters' strike, which crippled production last year. Therefore, there was a noticeable increase in the number of pilots commissioned by the nets (75 versus 54 in 2008).

Even so, in the face of bleak advertising prospects, cost considerations affected some new series' artistic and advertising values. It was reported that in some cases, networks asked production companies to reduce their license fee by up to 20 percent, which resulted in a reduced talent salary. Below-the-line savings were considered as well, such as shifting to multicamera shooting instead of single-camera production.

According to *The L.A. Times*, ultimately, upfront sales will be down 15 percent from last year, reaching \$7.4 billion for broadcasters' prime time TV commercials. Whatever commercial time inventory remains will be sold later in the season in what's known as the "scatter" market. In the past, "scatter" was a hot commodity: being scarce, it demanded more money. But if the economy doesn't improve, the inventory left unsold could become a problem. On the other hand, if the economy improves and a net finds itself with a hit show, the scatter market could bring real premiums. Last year the combined Upfronts for the broadcast nets, cable nets, syndicated shows (mostly barter) and Spanish-language TV generated about \$20 billion.

This time around, however, ad agencies weren't satisfied with just guaranteed "numbers" (ratings). Rather, "targeted reach" became the name of the game at the Upfronts. In any case, broadcasters



The stars of *Dos y Dos* at the Century Plaza Hotel

Before vertical integration, all U.S. TV networks eliminated their risks by farming out production, picking only the best and returning the duds.

According to RTE Ireland's Dermot Horan, who was seen at the Century Plaza checking out Canada's E! Entertainment's *The Bridge* (for CBS), this year there are three major trends: "CW is back to WB days targeting teens," others are favoring medical shows, and many are offering high-concept shows, such as Disney's *Flash Forward* and NBC's *Day One*. As most buyers, Horan would not divulge his picks for fear that the studios would increase their license fees.

At the Century Plaza and Intercontinental hotels in Century City, Los Angeles, 73 companies (studios and indies) exhibited along with a few distributors such as RHI, Lionsgate, Canada's Minds Eye and India's Zee TV, who made reservations directly with the hotels (rather than specialized agents) and therefore did not get suites assigned in time to be listed in *VideoAge's* official "L.A. Screenings Guide." Last year, there were 81 independent companies exhibiting. With 62 exhibitors, the Century Plaza returned as the dominant venue for indies, but its future as such was put into doubt by reports that it will be demolished and replaced with a condominium.

From a recreation standpoint, only Disney staged its traditional "Upfront" party — on its lot on May 24. Among the indies, Venevision and Telefe threw parties — the latter with a great burlesque show — while Flor Latina gave a luncheon and Telefilms accompanied its screenings with refreshments. The traditional telenoveleros party was



CBS Studios International's Armando Nuñez

can't complain: after all, it has been said that, collectively, they harvest 70 percent of TV ad revenues with just 40 percent of primetime viewership.

Overall, the U.S. networks picked up a total of 50 new series for their 2009-2010 primetime season, with a mix of 15 comedies, 29 dramas and six reality shows. With 10 pilots greenlit, Warner Bros. graduated as the studio with the largest output.

NBC increased the number of comedies in primetime, primarily with *The Jay Leno Show*, because, as NBC's own promotion touted, "If you're happy, we're happy." With *The Jay Leno Show*, NBC will reportedly be saving about \$50 million a year for the hour program, but it could end up costing the net \$100 million a year in lost ad revenues.

It was back to the future for ABC: out of the 11 new shows it picked up, eight are produced outside its Disney Studios.



Record TV's Delmar Andrade and Edson Mendes



Televisa's Mario Castro (left), Carlos Castro (center) and their team

(Continued on Page 16)



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L.A. Screenings (cont'd)

(Continued from Page 14)

canceled a few weeks prior to the event when a few of the sponsors withdrew their financial support. The Intercontinental Hotel organized a wine tasting party sponsored by GMX, with live Cuban/Brazilian music by Italian-born artist Gabriel Rosati and his Brazilatafro band.

But the studios were not the only ones showing financial restraint. Acquisition companies not only sent fewer buyers, but switched to more economical hotels as well. "A lot of buyers [are] staying at the London [formerly the Bel Age] this year," commented Horan. "As travel

budgets are cut back, establishments such as the Beverly Hills Hotel, the Four Seasons and the Peninsula [have been] abandoned in favor of the Sunset Marquis and London West Hollywood."

Among the first-time L.A. Screenings exhibitors were Echo Bridge, CABLEready, TPI and AETN. According to vp International Sales, Christian Murphy, the latter increased sales by 35 percent this year, due to local production cuts by TV networks. AETN's Mayra Bracer e them to target both commercial and educational/cultural channels.

At *VideoAge's* traditional L.A. Screenings breakfast meeting, the eight companies in attendance discussed the planned demolition of the Century Plaza and a "born-again" NATPE (if it were to relocate to Santa Monica, California in 2011 after its current run in Las Vegas ends in 2010), among other topics.

Overall, the L.A. Screenings ran a total of 12 days: five for the indies (May 18-22), and eight for the studios (May 24-29). For the indies, the Screenings did not go as well as those in 2008. The reasons are varied — some generated by fate, others self-inflicted.



Telefe's Alejandro Parra, Imedi's Bidzina Baratshvili, Telefe's Diana Coifman, Imedi's Giorgi Lomidze and friends

Last year, there was the writers' strike and the resulting dread of screening pilots at the studios. In a few cases, studios canceled their screenings for lack of product, sending a large number of buyers back to the indies.

This year, there was no writers' strike and plenty of studio product to screen. To make things even worse for indies, their screenings began too early, before most of the buyers had arrived. Some of the indies, especially the telenoveleros, rely on appointments, and were therefore assured a good number of visitors. But for those who depended mostly on foot traffic, the results were dismal, with "the most active," in the words of Bracer, being from Central America.

Observers commented that indies at the L.A. Screenings have to start exhibiting when most buyers have arrived, and just before the studios start their own screenings, with a two-day overlap.

The overlap is important because some of the buyers might leave the studio screenings early to wander around the hotels. To understand how early the indies left, consider that the Latin American divisions of Sony, Disney and WB did not set up shop at the hotels until May 25. Disney's very popular Latin party wasn't held until May 27.

This year, when some distributors realized that the bulk of the Latin buyers were arriving toward the end of the week — a few days after indies shut down their operations at the hotels — they decided to stay in town, even without an exhibiting suite. Traditionally, the independent distributors at the hotels cater to the Latin buying contingent, for which the Screenings are as important as NATPE. Nonetheless, Bracer reported that, "AETN met with 30 broadcasters over four days, so it wasn't too slow considering this was our first time at the market, but it definitely got much busier on Thursday [May 21] and Friday [May 22], and a couple of extra days would have yielded a few more meetings."

As usual, Canadians left earlier (before the Memorial Day weekend) to go back for their own Upfronts in Toronto, but since the indies' market consists mainly of Latin American buyers, the Canadians' actions didn't affect them.

The list of all pilots, exhibitors and studios' info can be found at: www.videoageinternational.com/screenings.html. ●

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The RFF is held July 6-11, 2009 at the following locations:

Auditorium Conciliazione

Via della Conciliazione, 4
Tel. 800-904-560 (local dialing for general info only)

Multisala Adriano

Piazza Cavour, 16-23
Tel. 06- 36-004-988

University LUMSA

Via di Porta Castello, 44
Industry Village, Tel. 06-684-221

The event is divided into two parts: **Competition** and **Business**. The Competition portion is comprised of the screening of 75 titles, 27 of which are world premieres.

The Competition is divided into three groups:

- International Competition: TV-movies, mini-series and continuing series (Multisala Adriano)
- International Competition Factual: documentaries and docudramas (Multisala Adriano)
- Italian Competition for Drama (Multisala Adriano)

In each of the three categories of International Competition, the following awards will be presented during the closing ceremony (July 11 at 9:00 pm at the Auditorium Conciliazione): Best television product; Best leading male actor; Best leading female actor; Best screenplay. Plus, the "Absolute Best" among all categories will be honored.

Two awards will be presented in the International Factual Competition: Best factual production; Best broadcast documentary.

In the Italian competition, honors go to: Best male actor; Best female actor; Best drama; Best soap-opera; Best sitcom.

In addition, Kenneth Branagh will receive a Lifetime Achievement award on July 10 at 10:30 pm in the Multisala Adriano.

The **Competition** program includes:

Special Events (Multisala Adriano)

Gray's Anatomy (U.S.) with Eric Dane, Justin Chambers.

July 8, at 8:00 pm, Sala 4.

Il Mostro (Italy) with Antonello



Pictured above: the press conference held in May to present the RFF program. Pictured right: House MD's Lisa Edelstein, who will be among the stars in attendance at this year's event.

Grimaldi, Lorenzo Miel, Sara D'Amico and cast.

July 8, at 10:30 pm, Sala 4.

House MD (U.S.) with Lisa Edelstein.

July 10, at 8:45 pm, Sala 6.

Wallander (U.K.)

July 10, at 10:30 pm, Sala 4.

Parallel Events (Multisala Adriano)

Noon@Night (late screenings)

July 6, at 11:30 pm, Sala 9.

July 7, 8, at 11:30 pm, Sala 6.

July 9, at 11:30 pm, Sala 9.

July 10, at 11:30 pm, Sala 6.

Men at Work (new programs in various production stages)

July 6, at 6:00 pm, Sala 3, 5, 9.

July 7, at 6:00 pm, Sala 3, 5, 6.

July 8, at 6:30 pm, Sala 5, 6.

July 9, at 6:30 pm, Sala 5, 6.

July 10, at 5:00 pm, Sala 5, 9.

Pilots (new shows with only pilots available)

July 7, at 5:00 pm, Sala 6, 9.

July 9, at 5:30 pm, Sala 9.

July 10, at 5:00 pm, Sala 6.

Sitcoms (the best of Italian situation comedies)

July 6, at 5:00 pm, Sala 6, 9.

July 7, at 5:00 pm, Sala 3, 9.

July 8, at 5:00 pm, Sala 9.

July 9, at 5:00 pm, Sala 9.

July 10, at 5:00 pm, Sala 9.

Retrospective

Colorful Programs in Black and White (The best of Italian television 1954-1977)

Multisala Adriano, July 6, 7, 8, 9, 10 starting at 5:00 pm, Sala 8.



The **Business (Industry)** program (all held in the LUMSA Industry Village) consists of:

- Roma TV Screenings (showcasing Italian TV drama productions)
July 6, 7, 9:30 am – 7:00 pm.
- Roma TV Pitching (bringing together potential co-producers)
July 8, 9, 10, 9:00 am — 6:00 pm.

Series (July 8)

Broken Hearts (Paesaggi Italiani, Italy)

Cleopatra (BBC Worldwide, U.K./U.S.)

East of Sicily (Einstein Multimedia Group, Italy)

Intelligence 2 (Mediaset, Italy)

Mr. 7 Minutes (Pierluca di Pasquale, Italy)

She Loves Me, She Loves Me Not (Pol-ka Producciones, Argentina)

The Big Game (7e Apache, France)

The Delinquents (Oscar Films, U.K.)

The Island (Palomar, Italy)

The Legend of Artreus (Telekinisi, Greece)

Miniseries (July 9)

Alias Garbo (Factotum Barcelona, Spain)

Aurelio Zen (BBC Worldwide, U.K./U.S.)

Benigna (Fireworx Media, South Africa)

Caino's Island (Solaris, Italy)

Fifth Business/The Deptford Trilogy (Rhombus Media, Canada)

For Fame and Fortune (Madison Davis Lacy, U.S.)

Renaissance (Lux Vide, Italy)

Shakespeare in Venice (VIP Mediacom, Italy)

Romantic Story of a Mysterious Genius (Publispei, Italy)

Tom & Frank (Prodigo Films, Brazil)

TV Movies (July 10)

A Public Man (Invisible Film, Italy)

Beneath the Underdog (Cinetica, Italy)

Manon Lescaut (K'ien Productions/Cipango, France)

Nova Scotia (Bard Entertainments, U.K.)

Print!! (TV On Producciones, Spain)

Shall We Dance (TimeLine, Ukraine)

The Children's Crusade (Baby Films, Italy)

The Island (Goalpost Pictures, Australia)

The Sun (Egypt Films/Galaxy7/Diagonal TV, Egypt/France/Spain)

The War to End All Wars (Pier Nico & Davide Solinas, Italy)

The **Business** portion of the Festival will also include a session called "Speed Dating," which will allow for quick and effective one-on-one meetings at LUMSA: July 8, 9 and 10 from 9:00 am until 6 pm.

The Italian TV companies' stands may be found at the LUMSA Industry Village.

CONFERENCES

Multisala Adriano

Opening (Auditorium Conciliazione, Sala Grande):

Moonshot — The Flight of Apollo 11 (with Buzz Aldrin), July 6 at 9:00 pm

- *Agents as Legal Partners* (talent agencies)

July 6 at 5:30 pm, Sala 6.

- *Exporting Italian Formats*

July 8, at 3:00 pm, Sala 6.

- *The Contents Industry in 10 Years*

July 9, at 9:30 am, Sala 4.

- *Documentary in the Era of User Generated Content*

July 9, at 3:30 pm, Sala 7.

- *Created By...* (the role of showrunners)

July 10, at 4:00 pm, Sala 4.

- *Round Table: Reality and Fiction*

July 10, at 4:00 pm, Sala 7.

Master Class (Multisala Adriano)

- *Lost* (with Damon Lindelof, Carlton Cuse, Jack Bender)

July 7, at 11:00 am, Sala 4.

- *Criminal Minds* (with Ed Bernero)

July 8, at 11:00 am, Sala 6.

- *Sling and Arrows/Som e Furia* (with Fernando Meirelles and Niv Fichman)

July 9, at 10 am, Sala 6.

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Roma Fiction Fest

(Continued from Cover)

equipped spaces at Lumsa University, located near the Vatican.

According to Macchitella, a former RAI program manager, an impressive showing of TV executives from many countries are expected to attend screenings of some 14 hours of Italian TV drama production, which he termed “a significant success since we are just starting it this year.” The Screenings will feature the best in recent Italian drama programming (including series, miniseries and TV movies) that was broadcast in Italy between September 2008 and June 2009.

The main objective of the new event is to engage attendees enough to further stimulate their interest in Italian productions.

“Italian fiction needs to become more aggressive on the international arena,” commented Macchitella, “and we are hopeful that this will happen with new stories, new actors and more competitive production values. We hope that the TV executives who will be attending the Screenings will begin to appreciate [Italian drama] and start thinking of how it can work for their TV networks.”

A series of pitching sessions will be held in the days immediately following the Screenings — July 8-10 — which will serve as meeting points for producers from across the world who are on the lookout for co-production opportunities. Last year’s pitching event brought together 800 producers and creative individuals in 350 sessions of



Actress Kim Cattrall with Marco Spagnoli

Roma Fiction Fest’s version of “Speed Dating,” which serves to bring creatives together to meet, greet and get down to the business of making television shows.

But Fiction Fest 2009 won’t be all about Screenings and pitching sessions. The event — one of the first major initiatives from the newly established Lazio Foundation for Audiovisual Development that is being promoted internationally by the governor of the region, Piero Marrazzo — is all about bringing in new TV business to Rome.

In a statement, Marrazzo said: “Fiction represents an indispensable identity factor and, as such, is crucial to promote the Lazio and Italy brands.” During the recent MIP-TV in Cannes, France, Marrazzo explained that 75 percent of Italy’s cinema and television enterprises (some 1,100 companies) are based in Rome and throughout the Lazio region. These employ 27 percent of Italy’s professionals (of these, 150,000 are in Rome).

Indeed, TV drama production is so important to Italy that the Foundation saw fit to preview Roma Fiction Fest outside of its scheduled July dates by offering audiences a series of initiatives



Teatro Adriano Multiplex Cinema

before the festival itself begins. In late April, the Foundation organized a premiere of one of Italy’s most anticipated productions this year, *Pinocchio*. This new adaptation of the famed tale was co-produced by Rome’s Lux Vide and London’s Power for RAI division, Raifiction. Following the debut, the full cast of the film sat down in the Conciliazione Auditorium for a chat with would-be Fest attendees.

While the television production industry is certainly booming in Italy, more can be done, said Marco Spagnoli, head of Special Events, North America, for Fiction Fest.

“The Italian Industry needs to understand what is working and what is not working on an international level,” said Spagnoli, noting how important it is to learn from experiences in the U.S. Spagnoli maintained that the goal of the festival isn’t just to showcase Italian product on a global stage, but also to challenge international broadcasters to determine if there is a place in the global marketplace for Italian drama productions. “Our job is not to provide an answer,” said Spagnoli. “We are just posing the question with the showcase. We’re trying to shine a spotlight on Italy’s best productions and then see what happens after our guests

have seen for themselves the quality of Italian productions.”

As such, this year’s Fiction Fest will play host to some big American names, including *Lost* creator, writer and executive producer Damon Lindelof and his colleague, Carlton Cuse, who serves as a writer and executive producer on the hit show. The duo will be receiving the “2009 Roma Fiction Fest Special Award,” a prize awarded to them due to the series’ “new and compelling narrative style.” Said Spagnoli: “The U.S. has the leading TV industry in the world and we want to follow its example.” Aside from Lindelof and Cuse, Fiction Fest will also welcome Brazilian director Fernando Meirelles (*City of God*), who will speak about television production, as well as other international guests whose names will be revealed at a press conference to be held prior to the event.

In addition to its usual bevy of awards to be presented during the conference’s International Competition, Roma Fiction Fest will also take a look back at the history of television drama with “Mystery in Black-and-White,” a retrospective on the golden era of black-and-white television that was organized in collaboration with RaiTeche (RAI’s archives division).

Roma Fiction Fest 2008 drew 40,000 attendees, including 4,000 TV professionals and members of the press from all over the world. One hundred ninety-four titles from 24 countries were screened, including 15 world premieres. Similar numbers are anticipated for this year’s edition. Companies expecting to make a splash at the event include RAI and Mediaset.

“We want to be like the L.A. Screenings,” said Macchitella, “and not in competition with MIP-TV and MIPCOM. We hope to serve as a venue where TV executives can screen our fiction and weigh its value to their TV schedules.” ●



From l. to r., Marco Spagnoli, Giorgia Zacchei, Steve Della Casa, Gaia Tridente and Fabrizio Accatino



Carlo Macchitella with VideoAge’s Dom Serafini

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Greek TV

(Continued from Cover)

With a rate of about 32 percent, television trails the magazine sector (42 percent of all Greek advertising revenue), though it should be noted that magazines have the advantage of offering popular giveaways — DVDs, cars and cash prizes — with their publications. In addition, print media offer better rates than their electronic counterparts, beating the competition for a piece of the ad pie, which, in 2008, was valued at 2.7 billion euro (excluding outdoor, direct mail and telemarketing).

The fact that standings in the television ratings race are differentiated by only a few percentage points means that net execs cannot allow much leeway when it comes to programs that aren't performing well.

These findings were recently released by the Athens, Greece-based J.T.TV International Co. in its bi-annual review of the 11 million-person television market in Greece.

There are 10 major networks comprising the Greek TV market—Mega Channel, Alter Channel, Antenna TV (Ant1), Star Channel, Alpha TV, ERT (with NET, ET1, ET3), SKAI and Maked TV. In addition, the country boasts 20 licensed local stations and over 160 unlicensed ones.

With a 19.7 percent average share, Mega Channel is the first-place network in the Greek TV market, boasting a winning formula of major Greek-language series, game shows, talk shows, and feature films from the Columbia (Sony) catalog. It continues to rank number one in the evening news competition and has invested heavily in major sporting events like the UEFA Cup and Champions League football games. In addition, Mega will air exclusive coverage of all the qualifying games of the Hellenic National Soccer team for the upcoming Mondial 2010.

Antenna TV SA, which, at a 15.7 percent share, ranks second, recently shifted its target to the 15-44 demographic. It acquired the rights to broadcast Formula 1 racing, starting with the Fall 2009 season. Antenna also boasts an output deal with 20th Century Fox, airing a number of the studio's feature films and series. Based on the success of its previous international programming, Antenna is introducing a different international series every night in its 11 p.m. slot — with titles like *Prison Break*, *Boston Legal*, and *Grey's Anatomy* as standouts. Furthermore,

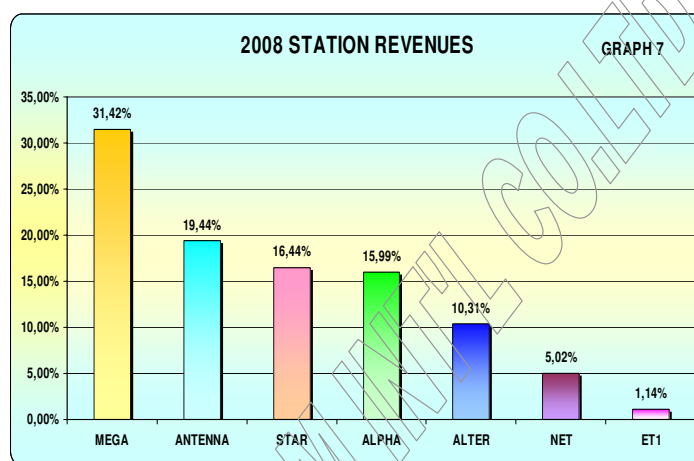
Antenna seeks to regain its reputation as a forerunner in the reality/game show sphere, with specific focus on the wildly popular *X Factor* series.

Third in the ranking is Alpha Media Group, with 13.22 percent of the market share. It's comprised of national TV channel Alpha TV, regional TV channel Cosmos TV, radio stations Alpha 98.9 and Pamos 98.8 and Plus Productions, Alpha TV's in-house production company. Alpha Media Group was recently acquired by the RTL Group, members of which now sit on the board of directors.

Ever since the sale to RTL was finalized, local productions offered by Alpha Media Group have been under intense scrutiny due to cost considerations. Generally speaking, Greek-language productions are expensive to produce, thus TV networks favor successful scripted formats and programs from the international market to compensate for the continuously plummeting advertising revenues. Another major change at Alpha Media concerns its main evening newscast, whose time slot has edged forward by an hour — from 8 p.m. to 7 p.m. — and whose coverage is now skewed more towards social issues and lifestyle fare.

Alter Channel SA's news broadcast focuses more on news and current affairs. When the arrival of one of the most talked-about newscasters boosted ratings in the 2007-2008 season, the network used this development as a lead-in to bolster the rest of its programming schedule. It inked a deal with the L.A.-based New Regency for a slew of feature films, and continues to offer the country's most comprehensive children's programming. However, in the changing revenue climate, Alter has since reduced its children's programming slot, opting

During the course of 2008, Mega Channel continues to remain number one in its revenue share, followed by ANTENNA TV, STAR CHANNEL, ALPHA TV and ALTER CHANNEL (GRAPH 7)



2008		
STATION	REVENUES	SHARE
MEGA	270.867.115 €	31,42%
ANTENNA	167.659.255 €	19,44%
STAR	141.706.362 €	16,44%
ALPHA	137.841.325 €	15,99%
ALTER	88.893.439 €	10,31%
NET	43.256.328 €	5,02%
ET1	9.857.955 €	1,14%

SKAI was not included in the calculations of 2008

instead to invest in talk shows, live entertainment and additional news shows. Strangely, no major sporting events are covered. The network now ranks fourth with 11.33 percent.

The state-owned ERT SA oversees the NET network (in addition to ET1 and ET3), and at the moment, is simply trying to retain a two-digit rating and share per outlet. The network group renewed its output deal with Disney ABC, which will continue to provide blockbuster features and high-ranking series. NET continues to host award-winning documentaries from the BBC, History and Biography channels, but has faced serious competition from rival station SKAI TV, forcing the network to remove the documentary slot from primetime and reposition it in either the morning or late-evening hours. ERT's focus seems to be more international in scope anyhow. It boasts an expanded World program, with particular emphasis on athletics and Greek-language series and movies for broadcast to the nearly five million Greeks living

abroad. Signals from the four DTT (digital terrestrial television) channels that ERT programs are currently received in North America, Australia, the Balkans and Western Europe.

Star Channel is positioned only slightly above NET in the ratings standings, and offers a slate of feature films and series from Warner Brothers studios, as well as occasional programming from CBS Paramount. Series such as *Friends*, *NCIS*, *Medium*, *Cold Case*, *Charmed* and *ER* have proven successful. Like Alter, Star does not broadcast any sporting events, but rather relies substantially on children's programming.

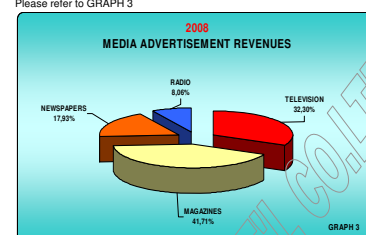
SKAI TV was initially launched on a pilot basis in April 2006, with a focus on documentaries and "infotainment." It reformatted and re-launched in October 2006, this time offering costume dramas and series geared towards young adults. SKAI was notably the first station in Greece to launch *The Oprah Winfrey Show*, and recently added a locally-produced morning talk show and daily cooking show geared towards a female audience. In an attempt to increase its position in the national rankings, SKAI has bolstered its roster with a number of high-profile international series. The *CSI* franchise, *Dexter*, *Californication*, *Top Gear*, *Doctor Who*, *24*, and *America's Next Top Model* are among the offerings that were added to the lineup this past fall. Furthermore, as of next season, SKAI will cover all of the Super League soccer games, in conjunction with Nova. Perhaps SKAI's greatest claim to broadcasting fame is that it is the only free terrestrial television station that operates tape-less, digitally transmitting all of its programming. Major stations throughout Europe are attempting to adopt (and adapt) SKAI's technology.

Maked TV, which only draws a 0.42 percent share of the Greek market, was not reviewed in the report. Greece's Forthnet acquired Nova, a satellite TV platform, last May for 490 million euro.

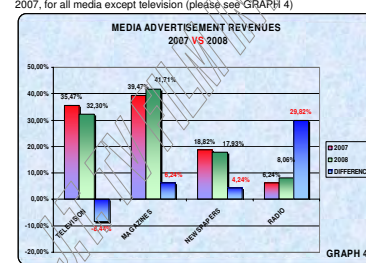
The developmental behaviors of the various networks are not surprising. When money is tight, it becomes increasingly important to rely on low-cost productions and acquisitions that will garner the greatest audience interest and advertising revenue. Game shows, always a safe bet for such reasons, continue to be popular among programmers, though they consistently require more and more extreme and provocative themes.

Legislation regarding the adoption of VoD and IPTV is currently being debated. Should these services be successfully implemented, the future of broadcasting, ratings and revenue could look a whole lot different. ●

For the whole of 2008 the media advertising revenues were divided as follows: Please refer to GRAPH 3



Generally, the advertisement revenues of 2008 were increased in comparison with 2007, for all media except television (please see GRAPH 4)



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TV Takes A Walk

(Continued from Cover)

digital out-of-home video market to post double-digit revenue increases over the next three to five years.

As Mark French, senior vp of New York-based NBC Everywhere, NBC's digital out-of-home video business operation, explained, "There are many things you can do on place-based platforms that you can't do on TV or even the Internet."

Major broadcast TV networks such as NBC and CBS have made strong commitments to the digital out-of-home market. NBC has an agreement with Ideacast—a company that delivers digital, out-of-home TV advertising platforms—which allows viewers access to CNBC and MSNBC content. The company also partnered with the University Network to provide NBC On Campus, which currently reaches almost six million students on 181 college campuses. NBC Everywhere's other out-of-home efforts include: NBC in Taxi, a strategic partnership with Clear Channel Taxi; NBC@Times Square, a video billboard owned by NBC Universal; NBC School-Channel One, Fuelcast Network, and NBC@Supermarkets. NBC Everywhere also has a partnership with New York's Arena Media Network, a firm specializing in out-of-home advertising in sporting and concert facilities, which has screens near concession stands in ballparks and arenas nationwide.

Connecticut-based CBS Outernet, a division of CBS, operates customized digital video networks in high-traffic retail locations. Its in-store TV networks now span over 10,800 U.S. locations, reaching 100 million viewers monthly. Those networks include a grocery network, which is currently installed in 1,500 grocery stores nationwide, and GameStop TV, which reaches over 4,300 GameStop stores across the country. CBS Outernet is also delivered through AutoNet TV, reaching over 5,000 auto service centers nationwide. Plus, it reaches hundreds of millions of monthly viewers through programming and/or sales arrangements with Gas Station TV, TheBITE Network, Mall of America, Royal Caribbean Cruises, the Healium Network and Simon Malls, among others.

According to Liz Ronan, vp, Alternative Marketing, for CBS Television, CBS's efforts in the out-of-home digital video market are largely promotional and brand-building in nature, aimed at generating exposure for the network's shows.

According to David Leider, CEO of New York-based Destination Media, which operates the Gas Station TV Network (GSTV), out-of-home networks have the ability to deliver TV content as a single channel in a more "actionable" environment to a captive audience without the intrusion of DVRs and other new



The BITE Network: leading the out-of-home charge

media. Currently, GSTV reaches 30 million viewers on a monthly basis at 1,000 gas stations, and is targeted at an active 18-plus audience of drivers on the go.

From the perspective of Jason Brown, president of Advertising Sales and Marketing for IdeaCast, public places offer great visibility for TV programming. IdeaCast's Health Club TV network is available in over 1,000 health clubs generating 170 million annual impressions. Its Airline TV network is available on 190 planes of three carriers, covering 27,000 screens, and reaching 37 million passengers. Its viewership is diverse age-wise, with 71 percent of its audience at health clubs between 18 and 49, and 68 percent of its audience on airlines between 25 and 54.

And there's significant evidence that viewing TV in the digital out-of-home market generates a real boost in at-home viewing, according to Bill Myers, co-founder and COO of Texas-based indoorDIRECT, which operates TheBITE Network, billed as a "cutting-edge network providing an insightful look at the world of news, entertainment and sports." For example, Turner Broadcasting found in a recent test with National CineMedia that screenings of its shows in theaters led to a significant increase in at-home viewership of that programming. Perhaps one of the most striking indications of the impact of TV viewing in the out-of-home market on at-home viewing was the success of the program *Everybody Loves Raymond*, largely due to its screenings on American Airlines.

Currently, TheBITE Network has a long-term contract with 1,000 restaurant locations reaching 10 million viewers a month. Typically, its audience is 53-55 percent male and 45-47 percent female. It is also fairly evenly distributed in the 18-25, 26-34, 35-44, 44-54, and 55-plus age groups, said Myers.

The digital out-of-home video market has special advantages for TV, because it offers "more viewer engagement, is closer to the point-of-purchase, and is TiVo-proof," pointed out Bill Powers, executive vp of Sales for Access 360 Media, a multi-platform media network with offices in New York and Venice, California that connects young adult consumers with the products they seek.

A key focus in the digital out-of-home market has been reaching the elusive young adult audience. Those in the 12-34 age range are particularly hard to reach

now, and their media consumption habits have changed dramatically, said Powers. "They don't watch TV on someone else's schedule. They watch TV online and on DVRs," he said.

The genre of TV programming in the digital out-of-home market is dictated by the location in which it's shown, Brown stressed. For example, live entertainment, news, and sports programming typically work well in health clubs. IdeaCast's health clubs show content from CNN and CNBC. Short content bites with updates, facts, and trivia pertaining to the news, weather, and sports presented in a "store and forward" context (a technique common in messaging services where a data transmission is sent from one device to another, but first passes through a server that is used by the message service to store the transmitted message until the receiving device can be located), are more appropriate for environments with short "dwell times," such as taxis, noted Brown.

Destination Media's Leider echoed this sentiment, pointing out that longer-form dramatic programming or movie trailers work well in movie theaters. For many other venues, with shorter windows and dwell times of around five minutes, shorter form content, from 10 to 30 seconds long, is more suitable.

Leider singled out gas stations, gyms, and airlines as strong out-of-home markets for TV. He feels each of these are particularly promising markets because each offers quality dwell time. Airlines have a particularly long dwell time, typically averaging two and a half hours. The average dwell time on treadmills at health clubs is also long, typically running 35 minutes, he said. Ronan pointed out that "high dwell" locations are particularly important for TV companies because they allow those companies to showcase more of their content.

CBS Television's Ronan emphasized the importance of delivering relevant content in the out-of-home digital video market. For example, to appeal to the young, game-centric audience their GameStop channel targets, CBS Outernet draws content from CNET.com, GameSpot.com, and music videos from VH1.

From Myers' perspective, entertainment and sports are some of the most popular programs in the out-of-home market, particularly Hollywood and TV content with behind-the-scenes material and

movie trailers.

Restaurants could be another key market for digital out-of-home TV. TheBITE Network saw a great opportunity in the fast-food restaurant market because of the size of that market and the fact that people feel comfortable in those environments and are seeking entertainment, explained Myers. In fact, an Arbitron study conducted in restaurants indicated that consumers had high recall and a huge appetite for entertainment-related services and products, such as TV, DVD, and video games, reported Myers.

He believes the out-of-home market is an ideal testing ground for regular cable and broadcast programs. He maintains that TV and cable companies could offer patrons in public places three-to-five minute samples of shows they might want to air in the home market as sneak previews. Currently, TheBITE Network is holding discussions with Hollywood studios regarding testing new TV shows and movies on the Network.

Although digital out-of-home networks have different arrangements with TV programmers, they don't typically pay for their content. Some of those networks offer programmers a share of ad revenue. Some digital out-of-home video networks are affording their venues more freedom and flexibility with content selection. For example, TheBITE Network offers "modularized content," allowing restaurants in its network to pick and choose content that suits their needs, according to Myers.

French was emphatic that simply repurposing regular TV programming in the out-of-home environment won't work because it usually doesn't offer added value. He stressed that TV programming in the out-of-home market must be customized to the venue; sports programming will naturally be relevant to arenas. In that regard, NBC Everywhere is delivering NBC sports programming in arenas via the Arena Media Network.

Significant opportunities exist for original and new programming in the out-of-home market. Original programming is central to CBS Outernet's approach. For example, custom pieces for holiday baking were developed for CBS Outernet's grocery network. Ronan noted that CBS keeps a dedicated stable of producers and editors specifically for the purpose of developing custom content for the out-of-home environment.

French reported that NBC has developed a considerable amount of original programming for the out-of-home market as well, delivering customized segments on all place-based platforms, though they are expensive to produce.

One of the more ambitious original content efforts in the out-of-home market is the program *Waiting for a Ride*, which Endemol is developing. The 12-part series of creative shorts, which centers around five friends on a road trip in search of waves on the West Coast, is due to launch sometime this year on over 12,000 screens in young adult retail stores that are part of Access 360 Media's retail network. ●

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DISCOP

(Continued from Cover)



Comcast's Jene Elzie

Jucaud, managing director of the Paris, France-based DISCOP East. "Some countries can still be considered as emerging marketplaces in terms of advertising expenditure per capita, disposable income, digital penetration and, most importantly, licensing revenues for our clients. Others are much more mature, with very competitive marketplaces, and are still buoyant despite the [financial] crisis."

Tobi de Graaff, director of Global TV Distribution for U.K.-based ITV Global, concurred. "CEE is certainly a mature market that is totally up to date with TV trends," he said. "But there is continued development as various platforms switch over from analog to digital and new media and multiplex channels emerge." As for concerns about the economy, de Graaff had few. "We believe DISCOP '09 will continue the theme of MIP-TV, with our clients looking for affordable programming with volume and family-oriented entertainment." Most importantly, he believes that DISCOP is a must-attend event since it "remains the affordable market for smaller territories that do not attend both MIPs."

For Jene Elzie, vice president,



Doing business at DISCOP 2008



DISCOP's Patrick Jucaud

International Sales and Strategic Planning for Los Angeles-based Comcast International Media Group, DISCOP East is simply a market that allows her and her colleagues to cover a lot of ground in a short time. "The term 'emerging' is a bit of a misnomer at this point," she said. "To me, a market that is emerging is still in its nascent stages. I would say that Eastern Europe is well past its dawn, but far from full maturity. It is really the best of both worlds: a sophisticated market with a tremendous amount of upside." And that upside generally comes in the form of program sales. "Celebrity plays well for us [in the region], be it celeb-reality, countdown shows, fashion make-overs or live events such as news or red carpet shows," she said. However, she also noted a trend towards local production and formats in Eastern Europe, saying: "We are also exploring opportunities in these realms."

Jonathan South, director, International Content Sales, EMEA, AETN International, concurred with Elzie that Eastern Europe could no longer be considered an "emerging" market. "Countries such as Poland and Hungary already have more sophisticated and diverse broadcasters to match the current media landscape in the region," he said. In fact, revenues from Eastern and Central Europe have grown so much in recent years that AETN International expanded its sales team, adding a dedicated sales rep, Joss Duffield, to cater to the increased demand from the region. Duffield will attend DISCOP East 2009, where he will present a variety of series, including *Life After People*, which uses film-quality visual effects to take a look at what would happen to the planet if the human race was to suddenly disappear forever; and unscripted series *Obsessed*, which explores the worlds of individuals facing debilitating anxiety disorders. While South is a big fan of DISCOP, he does have some suggestions for its improvement. "It's not particularly effective to have a sales market in a hotel," he said. "An alternative exhibition center would definitely work better."

Gary MacKinney, vp, International Sales for Sherman Oaks, California-based Rive Gauche Television, disagreed, saying changes are not necessary to make DISCOP better for his company. "We look to this trade show for opportunities to meet potential buyers and create new relationships, especially in untapped markets," he said. MacKinney also felt that while there's been tremendous growth in the region, "we have only scratched the surface for the potential opportunities and there is still a great deal of room for further expansion." He went on to say that in dire economic times such as these, it pays to provide cost-effective niche programming since buyers are cautious about spending. "As the privatization of television and increase in cab/sat offerings in the region continue, the demand for the kind of programming Rive Gauche offers will increase accordingly."

Jose Escalante, CEO and president of Dori Media's Latin America operations, said that his firm's programming — telenovelas — plays well in the region, no matter what's happening with the economy. He did, however, feel that a market like DISCOP is affected more by the financial crisis than the MIPs and MIPCOMs of the world. "I want to see what clients from Bosnia or Kosovo or Armenia have to say," he said, noting that very few of them made it out to Cannes for April's MIP-TV. "It's hard to get a real sense of what's going on there until you talk to the people in these countries. There can be a slowdown in buying, but we won't know for sure until we get there." Escalante also said that while he doesn't dislike Budapest, he'd love it if the market would move to a different locale each year. "Maybe Prague one year. Maybe Croatia the next," he said. "It would push producers from other countries to participate more."

Regarding this last point, Eric Muller, vp, International Sales for U.K.-based Power, disagreed, remarking that Budapest is probably the best place for DISCOP East, as it attracts more international flights than most other CEE locales.



ITV Global's Tobi de Graaff



Jonathan South of AETN

Muller will be at the market with the hopes of meeting with those clients who couldn't make it to MIP-TV this year, notably the Albanians, Macedonians and Bosnians who "maybe couldn't afford a hotel in Cannes, but can afford one in Budapest." He believes that the economic situation may make it tough to sell formats or reality shows, but that finished product should be a sure thing. "Most people will be buying smart," he said. "They'll buy family entertainment that's good — which is what Power has to offer."

Janne Parving, head of Sales and Marketing for Copenhagen's Nordisk Film TV World, which is heading to Budapest with a line-up that includes both formats and finished product, echoed Muller's sentiment. "Buyers will take fewer risks," she said. "Acquisitions of finished programming will fill more time slots, as it is cheaper. However, broadcasters will still need to make strong local programming, as this is the only way to brand its channel and maintain and win market share. In that respect, proven formats will offer an advantage, as when you buy them, you are also buying security and expertise."

Before the market opened, nearly 1,200 participants had already confirmed their attendance at the Budapest event. More than 350 international vendors and 1,000 buyers are also expected. The three-day market will be preceded by a one-day DISCOPRO conference that will focus on co-production opportunities within Central and Eastern Europe. DISCOPRO 2009 will include a workshop on the production of archive-based news segments and documentaries and a pitching session promoting a selection of 10 projects. Once the actual market begins, attendees can attend sessions such as "How to Turn Blocks of Airtime Into Gold," targeted at CEE TV stations looking to do business with direct response marketers. Parties will include the Telenovela Gala Evening hosted by Israel's Dori Media and a Danube Boat Party hosted by HBO Central Europe. **LHR** ●

A portrait of Robert Redford, smiling and wearing a dark blue denim shirt. He is outdoors, with a blurred background of trees and foliage. The text is overlaid on the right side of the image.

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Central and Eastern Europe By the Numbers

BY BOB JENKINS

Here's a question worth asking: Just how significant a medium is television in Central and Eastern Europe (CEE)? One way to ascertain the answer is to look at television's share of advertising revenue in the region, which encompasses 20 countries.

According to *Central and Eastern Europe Market and Media Facts 2008* — the most recent report from ZenithOptimedia, an ad agency with offices in 70 countries — television took 53.4 percent of the total regional advertising spend of US\$30.3 billion in 2007, or more than three times the share of the second place medium, newspapers (16.6 percent) and well ahead of the Internet (2.9 percent). Even though Zenith included Turkey and Greece in this region, these countries were excluded for this article.

Interestingly, in many of the larger territories of the DISCOP East region, television's share is below the regional average. In the Czech Republic, for example, its take is just 46.1 percent, or approximately US\$1.2 billion. In Russia, television claims a 49.2 percent share, roughly US\$4.4 billion. In Poland, it has 50.6 percent of the market worth US\$1.275 billion.

While in some of the up-and-coming markets, such as Croatia (66.5 percent, or US\$673 million) and Serbia (84 percent or US\$1.07 billion), it is the leading medium, in some parts of Central and Eastern Europe, television is very much the poor cousin. In Latvia, television's market share is only 34.8 percent (US\$64 million), and the medium's regional nadir is Estonia, where its share is just 26.7 percent (US\$41 million), just over half the share of newspapers. Both the biggest and smallest territories brought the average down. What made the average go up were the middle range territories.

In terms of how individual broadcasters fared in 2007, Russia's most successful was Pervy Kanal, which netted

US\$2.6 billion with a 21 percent share of the total audience and 21.9 percent of adults. Next was Rossiya, which grabbed US\$1.94 billion off the back of a 17 percent share of the total audience and 17.9 percent of adults. At the bottom of the Russian earnings table was Zvezda with US\$13 million, and a 0.7 percent share of both total audience and adults. Pervy Kanal dominated the ratings, with nine out of the 10 most popular programs broadcast in 2007 (the survey was published in 2008, so the figures are

and 18.5 percent, respectively). On the basis of these shares, TVP1 netted US\$480 million, and TVP2 US\$335 million. But even these numbers didn't earn either channel second place in the Polish market. That honor went to TVN, whose audience share of 16.5 percent overall, and 16.8 percent amongst adults was parlayed into a total advertising haul of US\$672 million. Bottom of the Polish revenue league was TV Polonia whose audience share of 0.7 percent in both categories was only worth



for 2007), but lost the top spot in terms of ad minutes per week to MTV, which clocked 1,555 per week versus 1,437 for Pervy Kanal (which actually places the latter in third place behind TV-3, which has 1,482).

With US\$692 million, Polsat was Poland's biggest earner, but, with an overall audience share of 16.8 percent and 16.2 percent of all adults, its audience share fell short of both TVP1 (23.2 percent of individuals and 23.4 percent of adults) and TVP2 (18 percent

US\$310,000, although it did win a bigger share of the audience than Discovery Science, Discovery Civilization, Canal +, VH1 Polska, Zone Reality 4Fun TV, Polsat Sport Extra, Canal + Sport, Zone Romantica, Kuchnia.tv and Travel Channel, all of which were unable to attract more than 0.1 percent of the audience.

In terms of ad minutes per week, very little divided the top two channels, with TV4 registering 1,683, just four minutes a week ahead of Polsat with 1,679. TVN

was in third place with 1,470 minutes, just narrowly beating fourth-place TVN7's 1,397.

Leading the dash for cash in the Czech Republic was Nova, with a haul of US\$266 million. It also grabbed the largest slice of the audience with 39.6 percent in both categories. Prima was the next biggest earner with US\$189 million, but its audience share, 19.1 percent overall and 19.4 percent of adults, was bested by state broadcaster CT1, which won over 22.7 percent of Czech viewers in both categories, but took only US\$71 million in advertising. But then it only carried 76 minutes per week of advertising against 1,512 carried by 12 other broadcasters including both Nova and Prima. (Note: These don't add up to 1.2 billion because there are a total of 22 channels that contribute to the total. We only picked highlights.)

Hungary's top cash cow was RTL Klub, which netted US\$417 million with a 26 percent share both overall and in adults. Not far behind in second place was TV2, pocketing US\$398 million from an overall audience share of 23.1 percent and 23.6 percent of adults. The extent to which these two broadcasters dominate the Hungarian market is underscored by the numbers for third place Viasat3, which claimed US\$202 million from an overall audience share of 5.4 percent and 5.7 percent in adults. National Geographic had the greatest number of minutes per week of advertising with 1,357, just ahead of Viasat3's with 1,354, while number one revenue earner RTL Klub had 1,006 and second place TV2 came in with 1,041 minutes per week.

There has been much talk of late of the coming of the Internet to Central and Eastern Europe, but in 2007, access was at best patchy. While low figures are to be expected from countries such as Armenia, which recorded the lowest level of Internet access (with just seven percent of Armenians having access), even in the region's dominant market, Russia, only 12 percent of the population managed to have access to the net in 2007. Top of the CEE's league for access to the Internet was Estonia, with 57 percent of Estonians having easy access — which maybe one reason why so few watch television. But Estonia is only slightly ahead of Slovenia — where 56 percent are online — with Latvia not far behind at 49 percent. In Hungary, 43 percent of the population has access, Bulgaria and the Czech Republic stand at 41 percent, and Croatia is 40 percent wired, with Poland trailing closely behind at 32 percent. ●

VideoAge at Roma Fiction Fest



Last year, *VideoAge* participated for the first time in the Second Annual Roma Fiction Fest. Having established that:

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VideoAge will have a major presence at the 3rd Annual Roma Fiction Fest, July 6-11, a special insert, and gladly recommends participation to all interested in the production, co-production and sale of drama programs worldwide.

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Conferences & Events News

AIR TRAVEL CHARGED BY THE POUND

Airlines are now back in the "transportation" (as opposed to "service") business. Specifically, they are offering transport from point A to point B — not a seat on an aircraft. This newfound model could spell trouble for overweight passengers who tend to have trouble fitting into the tiny allotted seats. At least four U.S. carriers — including American Airlines, Delta-Northwest, Southwest Airlines and United Airlines — are now requiring obese travelers to purchase two tickets. And airlines aren't the only businesses exacting larger fees from larger clients. Health insurance companies also charge extra to insure obese clients. In Canada, however, such extra charges are prohibited.

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My Two Cents

The late American economist Ezra Solomon once said, “The only function of economic forecasting is to make astrology look respectable.” So, instead of thinking forward, let’s go back to the year 2000 to see how things might improve in 2009. Nine years ago, the euro reached parity with the U.S. dollar and maintained it until January 2003. In my view, that parity helped the U.S. recession, which officially ended in November 2001. This means that the U.S. economy continued to grow despite September 11.

Similarly, the E.U. economy “hit the accelerator” in the year 2000 and recorded faster GDP growth and job creation from 2000 to 2007. In the 2000-2002 period, oil prices stabilized at \$20 per barrel.

In December 2007, the U.S. economy went into a recession and, in 2008, the E.U. economy shrank as well. On July 15, 2008, the U.S. dollar reached its lowest exchange against the euro at \$1.60. What does this preamble tell you? The Western economy is clearly better off when the dollar and the euro are in equilibrium.

I’m not an economist — I can’t even balance my checkbook. Come to think of it, neither can AIG, Citigroup, Lehman Bros. or Morgan Stanley’s well-paid executives. Which makes sense. As American physicist and Nobel Prize winner Sheldon Glashow once said, “Economic crises occur because financial experts don’t understand math.”

Now, it is true that showbiz thrives during recessions, but it is also true that the entertainment business does well during a healthy economic environment like the one created by the dollar-euro parity.

Check these figures out: In 2002, the U.S. entertainment media’s revenues grew by 8.8 percent over the previous year. Total box office spending grew by 13.4 percent. Total TV network programming spending reached \$11.4 billion and the growth of advertising spending in television was 7.6 percent.

Let’s compare that with 2008, when the dollar hit a record low against the euro. Total U.S. advertising expenditures declined 1.7 percent and broadcast television advertising diminished by 0.5 percent.

So, how does one maintain that fabled dollar-euro parity? One way is for governments to re-implement the fixed exchange rate, which, after WWII, facilitated trade investments, created stability, controlled inflation and, today, would discourage speculators. Do you remember “Black Wednesday,” or September 16, 1992, when the U.K. government was forced to withdraw the pound sterling from the European Exchange because the currency was under attack by speculators? That operation cost the U.K. government 3.4 billion pounds and made speculator George Soros over \$1 billion richer by shorting the sterling.

While a fixed exchange is set by governments, and is therefore well regulated, a “floating” exchange rate is determined by the private market, which doesn’t favor regulations that would stifle speculation. The private sector has its own rules that do not have national or international interests at heart. Remember that over \$1 trillion is traded in the currency exchanges on a daily basis, making it the largest market in the world. In comparison, at the peak of oil prices, daily oil trading was just \$12.5 billion. And speaking of oil, in July 2008, crude oil reached \$147 a barrel and speculation accounted for 81 percent of the oil trading volume.

This “trivia” is for those who profess that oil and other markets should not be regulated, but left to the laws of supply and demand.

Naturally, as soon as governments realized that oil speculators were wrecking their economies, they became vigilant, and the price of oil went from \$147 a barrel to \$33 in a matter of five months.

With this in mind, imagine the profits that just one cent of currency fluctuation a day could bring to speculators, to say nothing of stability and national interests.

Predictably, the proponents of “market knows best,” like Citigroup (which lost \$24 billion in 2008) would attack the exchange parity by bringing up disastrous cases like Argentina’s pegged exchange rates to the U.S. dollar and the florid currency black market in the former Soviet Union — both caused by applying irresponsible policies to sound basic principles, which they’ll forget to mention. The “market knows best” advocates also won’t be mentioning the success of the Bretton Woods system which, after WWII, allowed 44 Allied nations to create stability and economic recovery by having fixed exchange rates — until 1970 — with the U.S. dollar, either.

In conclusion, my friends, let’s start thinking in terms of fixed exchange currency rates. No matter how salient this thinking is, eventually it will become a murmur and then a roar and, ultimately, a crack of thunder that surely cannot be ignored by government officials, despite their traditional hearing problems when common sense is involved.

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